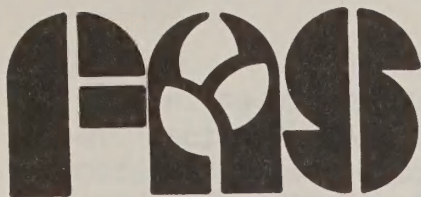


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REPORT

United States
Department of
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Foreign
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Service
Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 15-83

WASHINGTON, April 13--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

The 1982 ARGENTINE wheat crop harvested this past December has been estimated by the U.S. agricultural counselor in Buenos Aires at a record 14.5 million tons, 79 percent above the 1981 crop of 8.1 million tons. The upward adjustment in 1982 production is due to higher yields than earlier reported in southern Buenos Aires province. Exports are now expected to reach a record 10.3 million tons, almost 7 million greater than last year's and well over 4 million above the 1976/77 record.

FRANCE has signed new contracts for the sale of about 600,000 tons of soft wheat and 300,000 tons of barley to the Soviet Union. That will bring total European Community (EC) wheat sales to the Soviets this season to approximately 3.6 million tons, compared with less than 900,000 tons sold in 1981/82. This barley sale is the first this year to the Soviets, compared with about 700,000 tons sold last season.

The CANADIAN WHEAT BOARD recently announced initial grain payments to producers for the upcoming season. Wheat payment levels were reduced 2.5 percent to C\$ 170 per ton, while barley was reduced 14 percent to C\$ 95 per ton, resulting in the highest Canadian wheat to barley payment ratio in at least 20 years. Wheat payments remain near the record high payment levels of 1981 and 1982, while barley payments have been reduced for the second consecutive season, currently 23 percent below the 1980 and 1981 high payment levels. The Canadians have indicated they expect a 5-percent reduction in wheat area and a 15-percent reduction in barley area, both resulting in a substantial increase in rapeseed area. However, the high wheat payment level, combined with a drawdown in Canadian wheat stocks because of record wheat exports this season, will likely result in increased wheat and rapeseed area.

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OILSEEDS AND PRODUCTS

MEXICO is expected to import 400,000 tons of sunflowerseed in the October/September 1982/83 marketing year, a decline from the 600,000 tons previously forecast. Sunflowerseed imports in recent months reportedly have been limited because of price disagreements between CONASUPO, the Mexican purchasing agency, and crushers. CONASUPO also has delayed purchases of sunflowerseed to avoid competing with Mexico's safflower harvest. The relatively small safflower crop, currently estimated at just under 300,000 tons, means that CONASUPO will need to import additional quantities of sunflowerseed this summer, in addition to the 160,000 tons already purchased.

To circumvent difficulties with the industry over sunflowerseed imports, CONASUPO has increased its purchases of sunflowerseed oil. In March, CONASUPO purchased 80,000 tons of crude sunflowerseed oil. Previously, Mexico had not been expected to import any sunflowerseed oil during the marketing year.

The SOVIET UNION's recent purchase of 95,000 tons of soybeans marks the first entry into the U.S. market since late 1981. Shipment is expected soon. Demand for protein in the Soviet Union is expected to remain strong through the rest of 1983 and in 1984 because of the Soviet government's commitment to increase production of livestock and dairy products, as called for in the New Food Program adopted in May 1982. The Soviet Union is expected to import increasing quantities of soybeans and soybean meal to meet feed requirements of its record cattle herd and expanding hog population.

It is believed that the recent purchase does not represent a policy shift by the USSR. The Soviets turned to the United States for soybeans because of the relatively small Argentine 1983 crop and difficulties in arranging nearby shipments of soybean meal from Brazil.

It is expected that West European shipments of soybean meal will be lower than previously forecast. Consequently, Soviet soybean meal imports in 1983 are now estimated at 2.6 million tons, 400,000 tons lower than the earlier USDA estimate, but still nearly 1 million tons above the 1982 level. The estimate of Soviet imports of soybeans in 1983 has been increased 300,000 tons to 1.5 million. Additional purchases from the United States are possible.

COTTON AND FIBERS

In INDIA, exports of raw cotton have been running at record levels and are currently estimated at 625,000 bales for the 1982/83 season. A world scarcity of high-quality cotton has prompted an interest in Indian cotton. An additional factor has been the year-long Bombay mill strike, which has reduced domestic demand for cotton. However, with the return to work of nearly 65 percent of the labor force in the past two months, continued strong export demand and recent increases in the local price of cotton, there is concern in the Indian textile industry that supplies will not be adequate to satisfy domestic needs. Consequently, the Indian Cotton Mills Federation has asked the government to halt further export sales. The situation is currently under review by the Cotton Advisory Board and a decision by the government is expected soon.

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TOBACCO

MALAWI's Tobacco Control Commission recently estimated the 1983 burley crop at a record 48,000 tons, surpassing last year's record of 27,300 tons by 75 percent. The Commission also estimated the flue-cured crop at 24,000 tons, an increase of 8 percent over last year.

Malawi's burley production during the past four years has accounted for 30--45 percent of the total tobacco crop harvest. In recent years, Malawi has accelerated the ongoing trend for larger burley leaf crops by increasing harvest area in response to price increases for quality leaf. Burley area in 1983 is estimated at 38,446 hectares, an increase of 66 percent from the 1982 area. In 1982, burley area increased 45 percent from the previous year. Pre-season concerns over transportation bottlenecks that could reduce grower access to fertilizers apparently failed to materialize as increased yields suggest no shortage.

FRUITS AND NUTS

MEXICO's production of strawberries is expected to decline for the fourth consecutive year. The 1982/83 crop is currently estimated at 35,000 tons, 42 percent below the 1981 level. Contributing to the decline were severe frosts in the principal growing states of Michoacan and Guanajuato, insufficient supplies and delays in delivery of planting materials, additional cut-back in harvested area, increased production costs, and last summer's drought that adversely affected yields and quality.

	MEXICO: AREA AND PRODUCTION				
	1978/79	1979/80	1980/81	1981/82	1982/83 1/
Harvested Area (HA)	5,340	5,200	4,400	3,900	3,200
Production (MT)	87,450	82,900	77,000	60,000	35,000

1/ Preliminary

WOOD AND WOOD PRODUCTS

Total forest area in CHINA is approximately 120 million hectares, or 12 percent of the total land area. In 1982, the total growing stock amounted to 9.5 billion cubic meters (CM), but only 3.5 billion CM were of harvestable size. Although China currently produces nearly 50 million CM of logs annually, demand for wood and wood products far exceeds domestic supply capabilities. As a result, imports of timber have increased dramatically over the past three years from 0.58 million CM in 1979 to an estimated 3.4 million CM in 1982. The United States supplies approximately 60 percent of China's timber requirements. From practically zero in 1979, U.S. timber sales to China rose to \$41.4 million in 1980, \$89.2 million in 1981, and \$211.9 million in 1982. Current indications are that China will import approximately 3 million CM of timber from the United States in 1983, or roughly 75 percent of its projected imports for the year.

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Selected International Prices

Item	April 12, 1983		Change from	A year
			previous week	ago
	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
ROTTERDAM PRICES 1/				
Wheat:				
Canadian No. 1 CWS-13.5%*	204.00	5.55	+5.00	201.00
U.S. No. 2 DNS/NS: 14%...	185.50	5.05	+1.50	186.50
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	199.00
U.S. No. 2 S.R.W.....	160.00	4.35	-3.00	174.00
U.S. No. 3 H.A.D.....	191.00	5.20	+11.00	180.00
Canadian No. 1 A: Durum..*	207.00	5.63	+8.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	145.50	3.70	-.50	133.75
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	143.00
Feed Barley 3/.....	N.Q.	--	--	N.Q.
Soybeans and meal:				
U.S. No. 2 Yellow.....	254.00	6.91	+1.25	266.80
Brazil 47/48% SoyaPellets 4/	225.00	--	+3.00	N.Q.
U.S. 44% Soybean Meal.....	220.00	--	+4.00	230.00
U.S. FARM PRICES 5/				
Wheat.....	138.51	3.77	+2.20	135.20
Barley.....	77.62	1.69	+4.59	81.30
Corn.....	116.54	2.96	+1.18	99.61
Sorghum.....	107.14	4.86 6/	-.22	92.15
Broilers 7/.....	894.41	--	-5.95	970.69
EC IMPORT LEVIES				
Wheat 8/.....	96.92	2.64	-0-	81.80
Barley.....	101.25	2.20	-5.46	74.65
Corn.....	79.45	2.02	-1.06	87.70
Sorghum.....	74.99	1.90	-1.06	88.90
Broilers 9/.....	305.00	--	-0-	270.00
EC INTERVENTION PRICES 11/				
Common wheat(feed quality)	187.03	5.09	+3.39	183.34
Bread wheat.....	205.12	5.49	+3.49	210.52
Barley and all				
other feed grains.....	187.03	--	+3.39	183.34
Broilers 12/.....	1093.00	--	-12.00	N.Q.
EC EXPORT RESTITUTIONS (subsidies)				
Wheat.....	66.47	1.81	--	N.Q.
Wheat flour.....	N.Q.	N.Q.	N.Q.	N.Q.
Barley.....	79.15	1.72	--	N.Q.
Broilers 9/.....	207.00	--	-0- 13/	169.00
Sugar, refined 15/.....	396.23	--	+1.28	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Nine-city average; wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ Reflects change by EC effective Feb. 1, 1983 from 31.8 ECU's/100 kg. to 33.15 ECU's/100 kg. **Reflects exchange rate change only. 12/ F.O.B Price for R.T.C. Whole Broilers at West German border. 13/ Subsidy increase reflects change by EC Effective Feb. 1, 1983 from 20.50 ECU's/100 kg to 22.50 ECU's/100 kg. 14/ F.o.b. price for whole R.T.C. broilers at West German border. 15/ Week of April 1-6 based on a maximum subsidy of 37.345 ECU's per 100 kg. N.Q.=Not quoted. * June-July shipment. Note: Basis May delivery.

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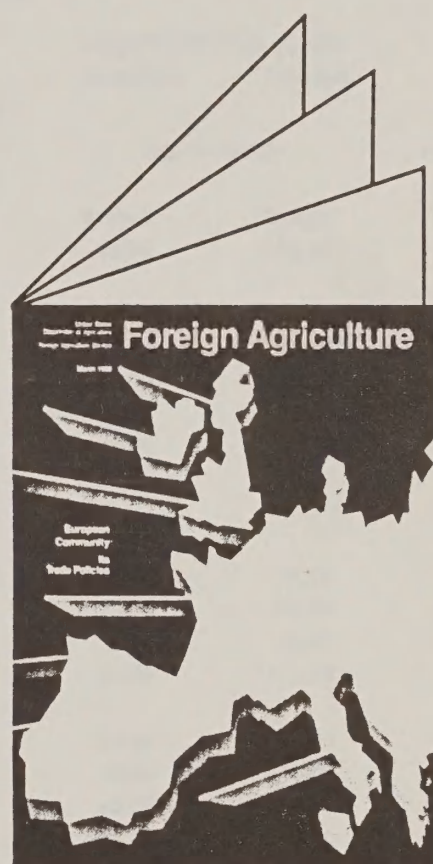
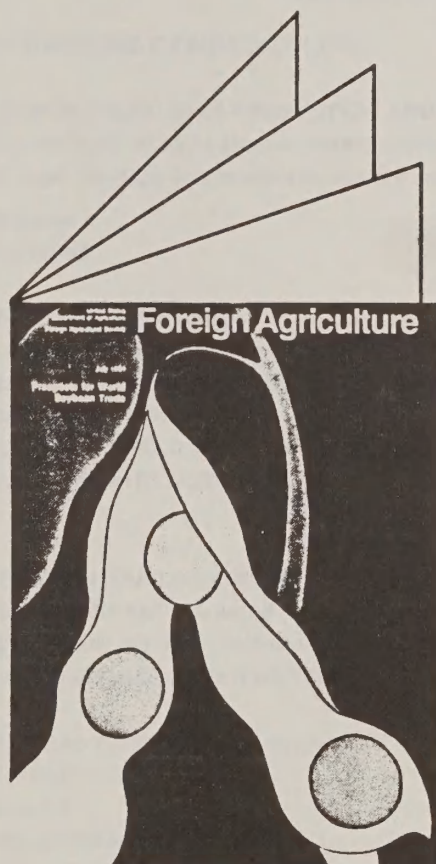
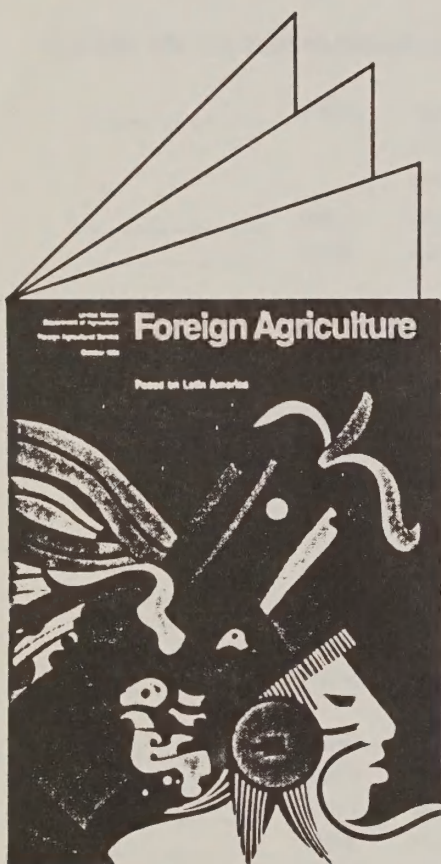
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